**Email Template**



Hello [NAME],

By now you should have received notice from CEC International Headquarters informing you of your approaching membership expiration and renewal process information. Your membership expires on [DATE]. We hope you are considering a return to CEC for another year of partnership, connection and collaboration!

In [UNIT] CEC, we have loved having you at [events, programs, etc.]. In the next year we are looking forward to [future programs and events]. This/these programs/events will offer [list benefits of these initiatives that this member has found appealing the past/would find appealing in the future].

Are you considering a return to CEC? Membership renewals can easily be processed online through [this link.](http://exceptionalchildren.org/renew) **We would also love for you to let us know!** Use the following link to let us know where you stand and how/if we can help you. This form will take less than 5 minutes to complete: [Link to form.](https://docs.google.com/forms/d/e/1FAIpQLSfxQ0M4Uf994RnNpwK8SYGvZjJgDniNVeoyjtBihFzqvhwDXg/viewform?usp=sf_link)

On behalf of the [UNIT]CEC board, we hope to hear from you soon!

Loyally,

[NAME]

[ROLE]

[CONTACT INFORMATION]

**Sample Phone Script**

Hi, [NAME]! This is [NAME] from [UNIT CEC]. How are you?

…

(Respond to their response.)

I won’t keep you long, I just wanted to make sure you received notice from CEC that your membership (has expired, is expiring on DATE). Have you decided if you’re continuing with your membership?

...

**1. (Yes I have, I am not returning.)** I’m sorry to hear that, I appreciate your willingness to take my call knowing that information. I am sure you’re provided CEC International with information on why you are not returning—I am wondering if you’d be willing to share anything the [STATE/PROVINCIAL] Unit could improve upon. Are there areas of improvement you feel we should work on? We would greatly appreciate your insight.

...

*Take notes. THANK THEM. Repeat back. Ask clarifying questions.*.

* *Questions can include:*
  + *What was most valuable about your experience? Least valuable?*
  + *What was missing from your experience in (state or province)?*
  + *Why did you join CEC? ...Was that purpose met during your time in CEC?*
  + *What, in your opinion, should our Unit do differently for its members?*
  + *Is there anything else you want me to know?*

*If they are unwilling to provide feedback:*

* I completely understand. Should you change your mind, please feel free to connect with CEC staff through email, chat or phone. *(Share if interested.)*
  + *service@exceptionalchildren.org*
  + *(888) 232-7733 or (703) 620-3660*
  + *Live Chat on Website*

*Let them know where their feedback will be taken (CEC team, your Unit’s board, etc.)*

*...*

NAME, is there anything else you’d like to share with me at this time?

…

Thank you again for your time and feedback. If you have any other feedback or thoughts, please send them to (email address for Unit OR CEC:

* + service@exceptionalchildren.org
  + (888) 232-7733 or (703) 620-3660
  + Live Chat on Website

…

**2. (No, I have not decided.)** Thanks for letting me know! Is there anything I can answer for you to help your decision-making process? If I can’t answer it for you, I am sure I can connect you to someone who can help!

…

*Take notes. Answer questions as your are equipped, offer to connect them with staff or Unit board members based on those you cannot answer. Be sure to highlight upcoming events, programs, etc. That would cater to their concerns (more PD, connection with members, leadership opportunities, etc.).*

...

*Offer to follow up with them*

…

**3. (Yes, and I will be returning.)** Thank you for letting me know! We are so excited to continue to have you as a member! Can I help you with your renewal process by providing you with the link to renew via email?

*If yes:* Great, what’s the best email I can share this with? *(follow-up with email immedaitely after call.)*

*If no:* Alright! Is there anything else I can help you with while I have you?

….

*Thank member for their continued membership and support of CEC.*

**Renewal Tips**

**Tone**

The tone of your letter or call says a lot about your Unit! While we want them to renew, our priority should be connection and learning from the member. Be sure that message is authentic! Consider:

* How do you want the reader to feel when they read this/when they chat with you?
* How often have your or members of the board communicated with this individual
* What is your your relationship with the member? What do you want them to feel when they disconnect from your call or email conversation?

**Audience (Email)**

* These should always be sent to the individual!
  + Consider using “mail merge” in Microsoft word to auto-populate names, expiration dates and send directly to the correct email address. Want more information on mail merging? [Check out Microsoft’s website for help!](https://support.microsoft.com/en-us/office/use-mail-merge-for-bulk-email-letters-labels-and-envelopes-f488ed5b-b849-4c11-9cff-932c49474705)

**Communication Candence**

* Remember, CEC does a lot of the leg work for this! This process is to HELP with renewals, not take over the process! You should reach out **before** the member has expired and follow-up if you have not heard back.
  + Pro Tip: consider calling if they are not responding via email.
* Consider reaching out to **lapsed members** within the next month—there's a chance they forgot to renew!
* If someone said the intend on renewing but lapse, **contact them again** with a reminder to renew